

# 2023 LORI Project Grants

## Accepting & Managing Your Award

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### Overview

LORI Project Grants are awarded to Library of Rhode Island (LORI) libraries, library consortia and library serving organizations to execute forward-looking projects that support the advancement of library services in Rhode Island. Projects awarded address priorities of the Office of Library & Information Services Five-Year Plan, including expanding access to library materials and services, expanding learning opportunities or promoting literacy, expanding or advancing the use of library services or the role of the library in the community, or creating more inclusive or accessible library services to all members of the community.

### Instructions

All grant management will be done in the State of Rhode Island eCivis Grant Management Portal. Additional user guides and help resources for managing your grant in eCivis are available at the [State of RI Resources for Applicants and Subrecipients](#).

### Accepting Your Award

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- OLIS will issue a Grant Agreement and Federal Assurances package to be signed via DocuSign.
- OLIS will return your signed documentation through DocuSign AND you will need to accept the award in eCivis as well.
- The primary applicant reviews the award in eCivis, and if no changes are needed, sends to OLIS for final approval.
- If changes are needed at this stage, the grantee will select “Return to Grantor” for an additional review.
- When it is accepted in eCivis, the library has a LORI Grant! You may begin the activities outlined in your application.
- All grant management will be conducted through the Award Dashboard in eCivis GMS portal.

## Managing Your Award

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- In the eCivis portal, the 2023 LORI Project Grant will appear in the applicant's list of grants.
- Click on the grant to see your Award Dashboard, which includes all grant management activities and their due dates. Activities include an interim and final financial report, an interim activity report, a final report, and a final financial closeout report.
- If you click on your grant and do not have access to the Award Dashboard, you likely have not completed the award acceptance process and need to accept your award.
- The library director/primary applicant may designate additional library staff to the grant team using the "Manage Grant Team" button from the Award Dashboard. Once added, grant team members will also find the LORI Grant in the list of grants in the eCivis portal.

## Financial Reports

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Grant funds may be requested up to once per month for reimbursement for expenditures made or in advance for expenditures to be completed within thirty days of the request. All requests for payment will be completed through the eCivis portal as financial reports.

- You will have two assigned reports:
  - **Interim Financial Report** is due on or before June 30, 2023; and
  - **Final Financial Report** is due on or before August 18, 2023.
- To start a financial report:
  - Select the appropriate report from the drop-down to complete the interim financial report in June and the final financial report in August.
  - Additional financial reports can be filed in either/both May and July; you will create a new financial report rather than select one of the assigned reports.
- Reports (requests) can be made for either reimbursement or advance funds.
- A financial report acts as the request for payment, however if you only wish to request payment once you may still submit a financial report with updates on your grant spending activities without requesting any funds.

## Requesting Funds for Reimbursement

- Fill out the amounts you spent in each of the budget categories.
- Check the "This report is a reimbursement" checkbox and fill in the amount you are requesting.

- Upload all accompanying back up documents with your report:
  - Back-up documents must show that the library has paid for the items/service in question, including a detailed list of items/services and the total amount paid.
  - Back-up can include invoices marked paid, scanned receipts, canceled checks, packing slips, credit card payments, or any combination thereof that meets the criteria above.
- Write a brief narrative of how the funds were spent.
- Submit your report to OLIS for review. If any changes or clarifications are needed, OLIS Grants staff will return your form to you with notes.

### **Requesting Funds in Advance of Expenditure**

- Initiate your financial report in eCivis.
- Leave the spent fields on your detailed budget blank.
- Check the “This report is a reimbursement” checkbox and fill in the amount you are requesting.
- Write a brief narrative of how these funds will be spent.
- When you have completed all your expenditures using these funds or no more than 30 calendar days after the request, initiate a new financial report.
  - Fill in the amounts you have spent in each budget category
  - DO NOT check the “This is report is a reimbursement” check box.
- Submit your report to OLIS for review. If any changes or clarifications are needed, the OLIS Grants Team will return your form to you with notes.

If you would like to request funds as a combination of reimbursement and advance, please contact Nicolette Baffoni ([nicolette.baffoni@olis.ri.gov](mailto:nicolette.baffoni@olis.ri.gov)) for further instructions.

## Requesting an Amendment

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Grantees may request changes to award activities and budget expenditures throughout the project period. As with all grant management, amendments will be requested through eCivis. It is important to contact OLIS and/or request an amendment in case your proposed changes are not allowable under the scope of your award.

Changes that do not require an amendment include:

- Small shifts within a budget category, getting a different brand or style of a requested supply, buying additional units of a requested item due to a decrease in price of that or other items, buying fewer units of a requested item due to a rise in price of that or other items, replacing one presenter on a topic with a different presenter on the same topic.

Changes that require an amendment include:

- Shifting funds between budget categories, even small amounts; or
- Making significant changes to project activities or spending.

Amendments will be filed in eCivis and reviewed by the OLIS Grants Team; approval and notification will also be conducted through eCivis.

## Other Reports

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You will have additional reports to file through eCivis as part of your grant management.

- **Interim Activity Report** is due on June 30, 2023 and will ask for a brief narrative of activities completed and progress on your grant project.
- **Final Report** is due on October 20, 2023 and will include a more detailed description of your project activities, output measures, outcomes assessment, and other information as needed for the OLIS federal report.
- **Final Financial Report** is due on October 27, 2023 and will aggregate all financial reports and closes out the grant in eCivis; this report cannot be filed until all other outstanding reports have been approved. This report must be filed or the grant is not considered "closed."

## Timeline

All reports, financial and otherwise, must be submitted through the State of Rhode Island's eCivis Grants Management Portal. Grantees may draw down funds up to once per month through eCivis during the project window for expenditures made or for expenditures to be made within thirty days. For more information on using eCivis to file reports, see the LGP23 Grants Management document on the OLIS website.

- **May 31** – Grant activities begin with the execution of the grant agreement on or before May 31; final date for grantee to accept award in eCivis.
- **June 30** – Interim Financial Report due in eCivis. Financial reports are the mechanism by which grantees both report on spending and draw down funds. Grantees must submit the Interim Financial Report and are encouraged, but not required, to draw down funds in that report.
- **June 30** – Interim Activity Report due in eCivis. The Interim Activity Report requires a short narrative on project activities that have been executed and planned.
- **July 1 – August 30** – Site visit occurs, as scheduled with OLIS grant liaison.
- **August 15** – Final day submit a Financial Report to draw down funds.
- **September 15** – Final day to complete project activities.
- **October 20** – Final Activity Report due in eCivis.
- **October 27** – Final Financial Report (Closeout) due in eCivis. This report will aggregate the information from previous financial reports and close the grant in the system. This report cannot be completed until all financial and activity reports are submitted by the grantee and accepted by OLIS.

## Contact

- For questions about grant management and program specific issues, contact Nicolette Baffoni ([nicolette.baffoni@olis.ri.gov](mailto:nicolette.baffoni@olis.ri.gov)).
- For technical issues with eCivis, use the State of RI [Grants Management Office User Support Portal](#); do not contact eCivis directly.